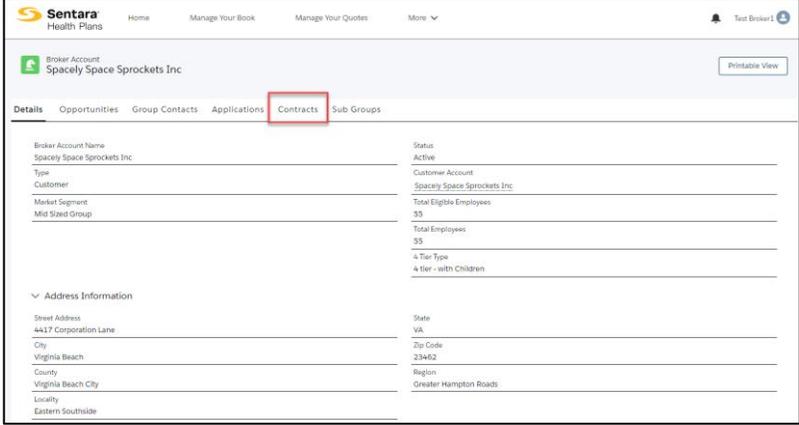
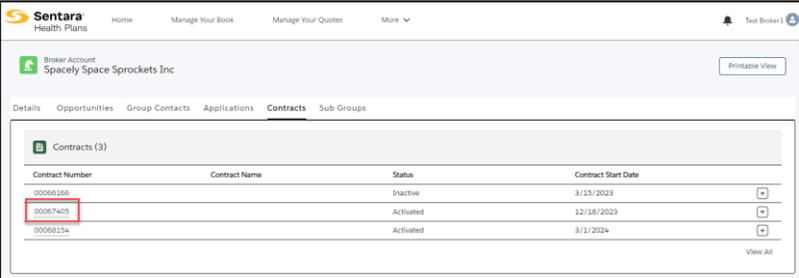
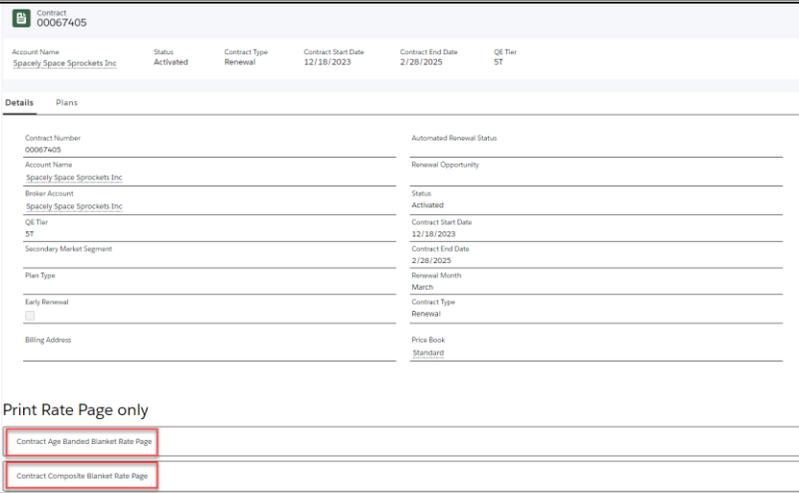
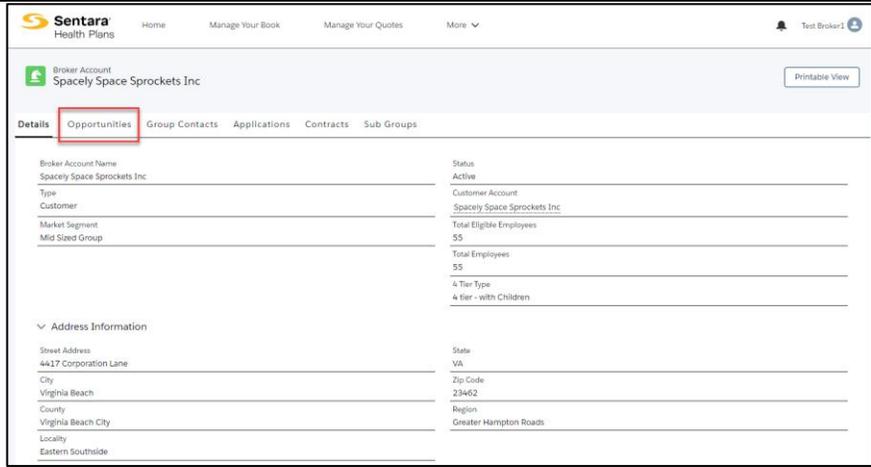
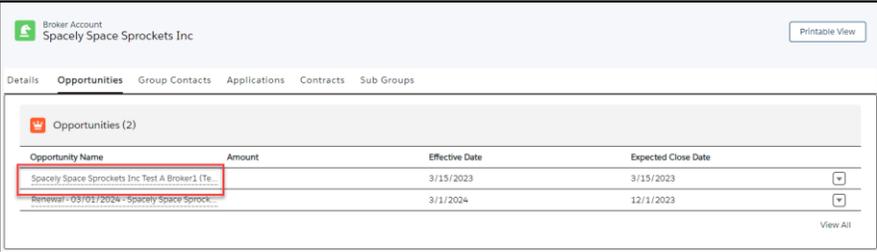
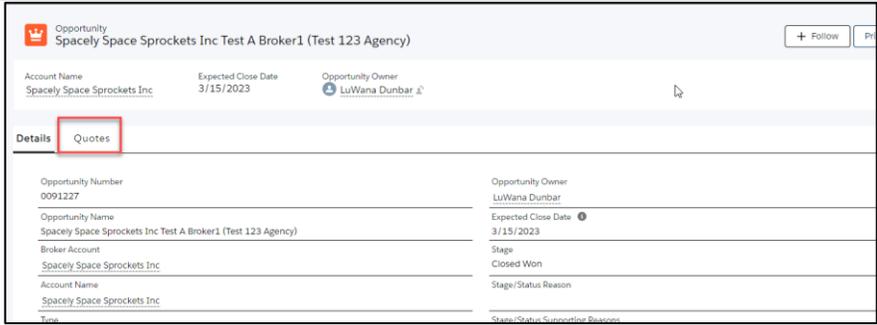


Purpose: This process outlines the steps to view and export an Account's Composite Blanket Page Rates or Age Banded Blanket Page Rates in eBroker. The reports are accessible from two different record locations:

1. The Contract Record, or
2. The Quote Record

From the Contract Record	
<p>Search the Account Record and click the Contracts tab.</p>	
<p>Click on the desired Contract Number.</p>	
<p>The Printable Rate Page links are located on the bottom of the Contract record > Details tab.</p> <p>Click on the appropriate Report Page link.</p>	

From The Quote Record	
<p>Search the Account Contact record and Click on the Opportunities Tab.</p>	
<p>Click on the Opportunity name/link.</p>	
<p>Click on the Quotes tab.</p>	
<p>Click on the Quote Number link.</p>	

Click on the Details Tab and scroll to the bottom of the page.

Click on the appropriate Report Page link.

Related **Details**

Quote Number 00077548	Effective Date 3/15/2023
Quote Name Spacely Space Sprockets Inc 3/15/2023 Test A Broker1 (Test 123 Agency)	Expiration Date 2/29/2024
Opportunity Name Spacely Space Sprockets Inc Test A Broker1 (Test 123 Agency)	Renewal Month March
Account Name Spacely Space Sprockets Inc	Overall Composite Rate Change
Funding Type Fully Insured	Overall Age-Banded Rate Change
Market Segment Mid Sized Group	Status Sold
Secondary Market Segment	Status Reason
Contact Name George Johnson	Status Supporting Reason
Sales Rep LuWana Dumbor	Carrier Spacely Space Sprockets Inc
Total Number of Employees 55	Type New Business
Eligible Number of Employees 55	Plan Type Contract
Number of Enrolled Employees 55	Description
Members # 21	Incumbent Carrier
Subscriber # 8	Other Incumbent Carrier
New Business <input checked="" type="checkbox"/>	Carrier Selected
Region Greater Hampton Roads	Lost to Carrier
County Virginia Beach City	Agency/Brokerage Test 123 Agency
Notable Conditions	General Agency Test General Agent
Total Member Claims > 10K	Primary Vendor Number Test-123
Winning Carrier	

System Information

Created By
Ken York, 3/15/2023, 4:04 PM

Last Modified By
Ken York, 3/15/2023, 4:27 PM

Print Rate Page only

Age Banded Blanket Rate Page

Composite Blanket Rate Page

The Reports

The selected report displays.

Click the Export button to export the report.

Note – for demonstration purposes only, both reports are displayed in this example.

Report: Rate Breakouts
Contract Composite Blanket Rate Page

Broker composite rate sheet for contracts

Quote Account Name	Plan Name	Quote Effective Date	Rate Breakout Name	Employee	Employee - Child	Employee - Children	Employee - Spouse
Test Group MM #3 Apr 8	Sentara Plus Design 2000/20% CL3 10-40/80/20%	5/1/2024	Composite Rates	\$1,579.87	\$2,211.96	\$3,199.94	\$3,717.84
	Sentara POS 2000/20% CL3 10-80-45/75/20% AD, 100 RI, CDD	5/1/2024	Composite Rates	\$1,886.70	\$2,366.90	\$3,181.40	\$3,550.47
	Sentara Advantage 10/20 DPH 10-80-45/75/20% AD, 100 RI, CDD	5/1/2024	Composite Rates	\$2,083.87	\$2,889.42	\$4,127.75	\$4,334.14

Row Counts: Detail Rows Subtotals Grand Total

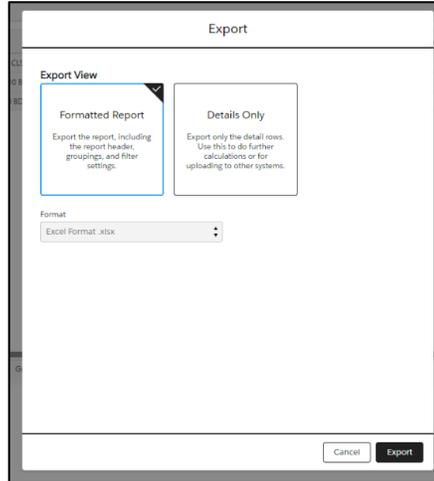
Report: Rate Breakouts
Age Banded Blanket Rate Page

Broker age banded rate sheet for quotes

Quote Account Name	Quote Effective Date	Plan Name	Rate Breakout Name	Total Price
TestRefund_50_4_8_024	5/1/2024	Sentara Direct Plus Gold 1000 Dnd 250 Fc Dnd CL3 AD25/50/20%/20% \$300 ma...	0-14	\$359.40
			15	\$391.34
			16	\$403.56
			17	\$415.77
			18	\$428.83
			19	\$442.08
			20	\$455.71
			21	\$469.80
			22	\$489.80
			23	\$489.80
			24	\$489.80
			25	\$471.68
			26	\$481.08
			27	\$482.25
			28	\$510.87
			29	\$525.71

Row Counts: Detail Rows Subtotals Grand Total

Choose the desired file format and click Export.



Formatted Report Examples

Note – for demonstration purposes only, both reports are displayed in this example.

Contract Composite Blanket Rate Page
As of 2024-04-17 18:18:25 Eastern Standard Time/EST • Generated by Test Broker1

Filtered By
Show: All quoted plan rate breakouts
Rate Breakout Name equals Composite Rates
Quote: Contract ID equals 80001000003RU

Quote: Account Name	Plan Name	Quote: Effective Date	Rate Breakout Name	Employee	Child	Employee + Children	Employee + Spouse Family
Test Group MM R3 Apr 9	Sentara Plus Design 3000/20% CLS 10/40/60/20%	5/1/2024	Composite Rates	\$1,579.97	\$2,211.96	\$3,159.94	\$3,317.94
	Sentara POS 2000/20/0% CLS 10 R0; 45/75/20% AD; 150 RX DED 5/1/2024		Composite Rates	\$1,696.70	\$2,366.98	\$3,381.40	\$3,550.47
	Sentara Heritage 100/20 0% 10 R0; 45/75/20% AD; 150 RX DED 5/1/2024		Composite Rates	\$2,063.87	\$2,889.42	\$4,127.79	\$4,334.14

Confidential Information - Do Not Distribute
Copyright © 2000-2024 salesforce.com, Inc. All rights reserved.

Age Banded Blanket Rate Page
As of 2024-04-17 18:24:09 Eastern Standard Time/EST • Generated by Test Broker1

Filtered By
Show: All quoted plan rate breakouts
Date Field: Created Date equals Custom (1/1/2024 to null)
Rate Breakout Name not equal to Composite Rates,Member Rates,Specific Stop Loss,Fiduciary Fee (Max Claims Liability),Aggregate Stop Loss,Administrative Fee
Quote: Quote ID equals 0Q051000008ms3

Quote: Account Name	Quote: Effective Date	Plan Name	Rate Breakout Name	Total Price
TestEndtoEnd_SG_4_9.024 1/1/2024		Sentara Direct Plus Gold 1000 Ded 250 Rx Ded CLS AD:25/50/20%/20%; \$350 max; \$250 RX DED	0-14	\$359.40
			15	\$391.34
			16	\$403.56
			17	\$415.77
			18	\$428.93
			19	\$442.08
			20	\$455.71
			21	\$469.80
			22	\$469.80
			23	\$469.80
			24	\$469.80
			25	\$471.68
			26	\$481.08
			27	\$492.35
			28	\$510.67
			29	\$525.71
			30	\$533.22
			31	\$544.50
			32	\$555.77
			33	\$562.82
			34	\$570.34
			35	\$574.10
			36	\$577.85
			37	\$581.61
			38	\$585.37
			39	\$592.89
			40	\$600.40

Please contact thelearninghub@sentara.com if you have any questions or need further assistance.